



The Cortex Report

Customized for the

San José Retirement Boards

March 2020

FCERS 2-20-20

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Introduction to The Cortex Report

Welcome to **The Cortex Report**, a bi-monthly publication that has been customized for your board. The Cortex Report identifies various conferences, seminars, courses and other education events over the coming months that may be of value to trustees and staff.

Education events are sorted in chronological areas, and include information such as event name, event sponsor/provider, date, target audience, topic areas, fees, and a general description. Each event listing also contains a link to the event sponsor's website. If you are interested in attending an education event, please be sure to check the sponsor's website for complete details.

In preparing your report, we have selected education events based on the following parameters, as determined in consultation with your staff:

- **Event target audience:** US Public Sector Funds.
- **Event location:** Continental United States and Canada.
- **Major topic areas:** General, Investments, Operations, Pension Plan Policy, Board Governance and Leadership, Risk Management.

Please also note the terms and conditions for use of this report at the end of the report.

The Cortex Report does not at this time include education events sponsored by investment consultants or investment managers.

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Nov 15, 2020	International Foundation of Employee Benefit Plans (IFEBC)	Annual Employee Benefits Conference	Honolulu	41	<i>New</i>
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Jan 24, 2021	National Conference on Public Employee Retirement Systems (NCPERS)	Legislative Conference	Washington	44	<i>New</i>

Event Listings

The Cortex Report prepared for the San José Retirement Boards

Conference: Annual Conference

Start Date: March 02, 2020

Organizer: National Institute on Retirement Security (NIRS)

End Date: March 03, 2020

Location: Washington, District of Columbia

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Pension Plan Policy

Attendance: Members Only

The National Institute on Retirement Security is a non-profit research and education organization established to contribute to informed policymaking by fostering a deep understanding of the value of retirement security to employees, employers, and the economy as a whole. Located in Washington, D.C., the organization has a diverse membership of organizations interested in retirement security issues such as employee benefit plans, state or local agencies that manage retirement plans, trade associations, financial services firms, and other retirement service providers.

The theme for this conference is: 2020 Vision: The Future of Retirement.

See the website for more information about the conference.

Fees

No charge

Contact

Nicole Dascenzo
Manager of Membership
Services
Phone: 202-457-8190

Email

membership@nirsonline.org

Link: <https://www.nirsonline.org/events/nirs-annual-conference/>

Course: NFP Program

Start Date: March 02, 2020

Organizer: Institute of Corporate Directors and Rotman School of Management (U of

End Date: March 03, 2020

Location: Toronto, Ontario, Canada

**Alternative Date(s)
& Location(s)** March 30-31, 2020, Edmonton AB
April 27-28, 2020, Halifax NS
May 25-26, 2020, Ottawa ON

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program focuses on key accountabilities and responsibilities of leaders of not-for-profit (NFP) organizations through extensive use of team-based learning to ensure participants learn from both faculty and their peers.

Attend this program and gain the following benefits:

- Understand your fiduciary duty
- Learn best practices in governance
- Build group decision-making skills
- Apply change management principles to elevate board effectiveness

See the website for more information about the program.

Fees

\$2,500 CAD + tax
Full - accepting wait list.

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/NFP-Program.aspx>

Conference: Spring Conference

Start Date: March 04, 2020

Organizer: Pension Real Estate Association (PREA)

End Date: March 05, 2020

Location: Beverly Hills, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

The Pension Real Estate Association (PREA) is a non-profit trade association for the global institutional real estate investment industry. PREA currently lists over 700 corporate member firms across the United States, Canada, Europe and Asia. Its members include public and corporate pension funds, endowments, foundations, Taft-Hartley funds, insurance companies, investment advisory firms, REITs, developers, real estate operating companies and industry service providers.

PREA holds two major conferences each year: the Spring Conference and the Annual Institutional Investor Real Estate Conference.

See the website for more information about the program.

Fees

\$525 - non-member
\$150 - member

Contact

Amy Laffargue
Director, Meetings and Events
Phone: 860-785-3846
Fax: 860-692-6351

Email

amy@prea.org

Link: <https://spring2020.prea.org/>

Conference: Responsible Investment Forum

Start Date: March 04, 2020

Organizer: Private Equity International

End Date: March 05, 2020

Location: New York, New York

**Alternative Date(s)
& Location(s)** June 11-12, 2020, London, UK

Topic Area: Operations

Attendance: Members Only

This forum brings together sophisticated LPs, GPs and private equity associations to discuss why, when, and how your firm should be implementing an effective ESG strategy for private equity. Discussion topics include:

- Bridging the LP-GP divide on ESG
- ESG reporting and metrics for success
- Focusing on diversity at the fund level and portfolio level
- Placing climate risk at the top of your agenda
- Human capital as a driving force for value
- ESG and the American Frontier
- The ESG and impact investing dynamic
- Engaging the UN Sustainable Development Goals (SDGs) as a strategic assessment tool
- Value creation with ESG

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer to register.

Contact

Please go to the website to contact the conference organizer.

Email

N/A

Link: <https://www.peievents.com/en/event/responsible-investment-forum-new-york>

Conference: General Assembly

Start Date: March 07, 2020

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: March 10, 2020

Location: Rancho Mirage, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Members Only

The California Association of Public Retirement Systems (CALAPRS) sponsors educational forums for sharing information and exchanging ideas among trustees and staff of California public retirement systems to enhance their ability to administer public pension plan benefits and manage investments consistent with their fiduciary responsibility. CALAPRS carries out its mission through an annual conference called the General Assembly, round table meetings for discussion of topics of interest, and the annual Principles of Pension Management course.

The General Assembly is an educational conference for retirement system trustees, senior staff, and annual sponsors of CALAPRS.

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website and log in.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 415-764-4860
Toll-free: 1-800-RETIRE-0
Fax: 415-764-4915

Email

info@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1229976&group=>

Conference: Spring Conference

Start Date: March 09, 2020

Organizer: Council of Institutional Investors

End Date: March 11, 2020

Location: Washington, District of Columbia

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Corporate Governance

Attendance: Members Only

The Council of Institutional Investors (CII), is a nonprofit, nonpartisan association of U.S. asset owners, primarily pension funds, state and local entities charged with investing public assets and endowments and foundations, with combined assets of \$4 trillion. Its associate members include non-U.S. asset owners with more than \$4 trillion in assets and a range of asset managers with more than \$35 trillion in assets under management. CII is a leading voice for effective corporate governance, strong shareowner rights and vibrant, transparent and fair capital markets.

More information about the conference is not yet available.

Fees

No charge for members.
Please contact the conference organizer to become a member and register.

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=3/9/2020&eventid=47

The Cortex Report prepared for the San José Retirement Boards

Conference: Talent 2020

Start Date: March 19, 2020

Organizer: The Conference Board

End Date: March 20, 2020

Location: New York, New York

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Human Resources

Attendance: Open To All

This conference will be driven by insights from innovators who are disrupting the nature of work, leadership development, succession planning, what it means to be digital, and much more. It will be a highly interactive summit in which every participant shares challenges and advancements.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,395 - members

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/conferences/conferencedetail.cfm?conferenceid=3073>

Conference: Spring Conference

Start Date: March 22, 2020

Organizer: Journal of Investment Management

End Date: March 24, 2020

Location: San Diego, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Members Only

This conference is titled Asset Allocation & Supporting Risk Analysis. Asset allocation is arguably the most important activity in the management of a portfolio. The conference will feature presentations on some of the state of the art analyses which supports the asset allocation function by the pioneers of the field. This event is co-sponsored with Invesco and the Rady School of Management, University of California San Diego. Featured presenters:

Harry Markowitz, Keynote Speaker
Richard Bookstaber, University of California and Talagent Financial
Andrew Lo, MIT Sloan School of Management
Vineer Bhansali, LongTail Alpha
Mark Kritzman, Windham Capital Management
Marty Leibowitz, Morgan Stanley
Joseph Engelberg, University of California San Diego
Nick Savoulides, Invesco
See the website for more information about the conference.

Fees

\$3,000 - guest seat
\$5,000 - annual membership
(includes Spring & Fall
Conferences)

Contact

Phone: (925) 299-7800
Fax: (925) 299-7815

Email

customerservice@joim.com

Link: <https://www.joim.com/conference-series/>

Course: Audit Committee Effectiveness

Start Date: March 23, 2020

Organizer: Institute of Corporate Directors

End Date: March 23, 2020

Location: Halifax, Nova Scotia, Canada

Alternative Date(s) April 8, 2020, Vancouver BC

& Location(s) September 30, 2020, Winnipeg MB

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues.

See website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: February 24, 2020

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/Audit-Committee-Effectiveness.aspx>

Conference: Fixed Income & Credit

Start Date: March 24, 2020

Organizer: Pensions & Investments

End Date: March 24, 2020

Location: Dallas, Texas

Alternative Date(s) March 26, 2020, New York NY
& Location(s)

Topic Area: Investments

Attendance: By Invitation Only

Investors need assets that provide returns in a low-yield environment. Recent years have seen a major shift into private credit, strong interest in unconstrained fixed income, and growing interest in emerging markets and quant strategies. This conference will provide a survey of fixed income assets and strategies, and how they fit into a risk profile.

See the website for more information about the conference.

Fees

Not yet available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/fixed-income/2020>

Conference: Fixed Income & Credit

Start Date: March 26, 2020

Organizer: Pensions & Investments

End Date: March 26, 2020

Location: New York, New York

Alternative Date(s) & Location(s) March 24, 2020, Dallas TX

Topic Area: Investments

Attendance: By Invitation Only

Investors need assets that provide returns in a low-yield environment. Recent years have seen a major shift into private credit, strong interest in unconstrained fixed income, and growing interest in emerging markets and quant strategies. This conference will provide a survey of fixed income assets and strategies, and how they fit into a risk profile.

See the website for more information about the conference.

Fees

Not yet available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/fixed-income/2020>

Course: Advanced Principles of Pension Management for Trustees

Start Date: March 30, 2020

Organizer: CALAPRS - In association with UCLA Anderson School of Business

End Date: April 01, 2020

Location: Los Angeles, California

Alternative Date(s) & Location(s) N/A

Topic Area: General

Attendance: Members Only

The California Association of Public Retirement Systems (CALAPRS) sponsors educational forums for sharing information and exchanging ideas among trustees and staff of California public retirement systems to enhance their ability to administer public pension plan benefits and manage investments consistent with their fiduciary responsibility. CALAPRS carries out its mission through an annual conference called the General Assembly, round table meetings for discussion of topics of interest, and the annual Principles of Pension Management courses.

More information about the course is available exclusively to CALAPRS member systems and sponsors. Please visit the website and log in.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 415-764-4860
Toll-free: 1-800-RETIRE-0
Fax: 415-764-4915

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1276553&group=>

Course: Audit Committee Effectiveness

Start Date: April 08, 2020

Organizer: Institute of Corporate Directors

End Date: April 08, 2020

Location: Vancouver, British Columbia, Canada

Alternative Date(s) & Location(s) March 23, 2020, Halifax NS
September 30, 2020, Winnipeg MB

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues.

See website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: March 11, 2020

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/Audit-Committee-Effectiveness.aspx>

Conference: Annual Conference

Start Date: April 14, 2020

Organizer: Pension Bridge

End Date: April 15, 2020

Location: San Francisco, California

Alternative Date(s) & Location(s) N/A

Topic Area: Investments

Attendance: Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

Facing a challenging investment environment, this conference will focus on capital preservation, identifying the key reward drivers for generating consistent returns.

As the industry awaits an expected cycle contraction, speakers will discuss challenges, strategies and opportunities this poses, highlighting structural transformations and investment ideas that will be beneficial to long-term fiscal sustainability.

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 561-455-2729

Email

info@pensionbridge.com

Link: <https://www.pensionbridge.com/theannual>

The Cortex Report prepared for the San José Retirement Boards

Conference: Annual Conference

Start Date: April 19, 2020

Organizer: Public Retirement Information Systems Management (PRISM)

End Date: April 22, 2020

Location: Atlanta, Georgia

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Operations

Attendance: Members Only

The purpose of the PRISM organization is to provide a forum for IT management of public retirement funds to collaborate and share their experiences with new technologies affecting the retirement and IT industries.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

Please go to the website to contact conference organizer.

Email

N/A

Link: <https://prism-assoc.org/CustomPage/Index/31>

Course: Private Equity: Investing and Creating Value

Start Date: April 20, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: April 24, 2020

Location: Philadelphia, Pennsylvania

**Alternative Date(s)
& Location(s)** Oct. 19-23, 2020, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program is designed for institutional investors as well as investment professionals aspiring to be better private equity managers. It will deliver the latest information about the private equity sector, while teaching the concepts investors need to know to evaluate investment opportunities in the private equity space. Topics include:

- Fund Structure
- Leveraged Buyout Model and Comparables Analysis
- Deal Origination, Transaction, and Execution
- Value Creation With Operations and Negotiation
- Advanced And Best Practices In Private Equity
- Commercial Due Diligence
- The Limited Partners' Perspective
- Growth Equity
- Middle Market Private Equity
- Private Equity In Emerging Economies

See the website for more information about the program.

Fees

\$11,350

Fees include accommodations and meals.

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/private-equity-investing-and-creating-value>

Course: Portfolio Concepts and Management

Start Date: April 20, 2020

Organizer: Wharton School, University of Pennsylvania - for the IFEBP

End Date: April 23, 2020

Location: Philadelphia, Pennsylvania

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

This program provides the core principles of portfolio theory and investment performance measurement, offering practical tools and experiences to help you make reliable investment management decisions. Topics include:

- Introduction and Overview of Financial Assets
- Fundamentals of Portfolio Theory
- Performance Evaluation
- Fundamentals of Valuation
- Managing Pensions in a Risky Global Environment
- Macroeconomic Issues and Financial Markets
- Asset Allocation and Impacts of Risk on Return

See the website for more information about the program.

Fees

\$6,235 - non-members
\$5,795 - IFEBP members
\$300 discount for registration by
March 9, 2020

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/wharton/Pages/portfolio-concepts-and-management-2004.aspx>

Conference: Chief Investment Officer Summit

Start Date: April 21, 2020

Organizer: Plan Sponsor

End Date: April 22, 2020

Location: New York, New York

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

The summit is designed to address the investment, strategic and operational challenges facing asset owners with a minimum AUM of \$1B+ (pension funds, sovereign wealth funds, endowments & foundations, healthcare and insurance funds, large family offices). It will bring together CIOs and senior investment consultants to discuss a range of topics including:

- Insulating Portfolios Against Geopolitical Risk
- Internal Alpha vs. External Alpha
- ESG vs. Divestment
- Best practices for Succession Planning
- Models for Strategic Investment Partnerships, including CoInvestments
- The Lure of Private Markets.

More information about the conference is not yet available.

Fees

Complimentary for CIOs and senior investment executives of large institutional funds.
Please contact conference organizer to register.

Contact

Carol Popkins
Phone: 203-461-0985

Email

carol.popkins@issmediasolutions.com

Link: <https://www.ai-cio.com/events/2020-chief-investment-officer-summit/>

Course: Venture Capital

Start Date: April 27, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: May 01, 2020

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) Dec. 6-10, 2020, San Francisco
CA

Topic Area: Investments

Attendance: Open To All

This program will discuss how venture capital funds are organized, how investments are selected, and how due diligence is conducted. It will examine case studies that detail a transaction from beginning to end. Participants will see how a deal is structured, learn more about the differing incentives of a VC fund and entrepreneurs, and gain a deeper understanding of venture investing. Session topics may include:

- Limited Partner/General Partner Negotiation and Contracting
- The VC Business Model: Sourcing, Screening, and Selection
- Venture Capital Valuation Method
- Term Sheets: The Venture Capitalist's and Entrepreneur's perspectives
- Deal Sourcing
- Managing Innovative Processes
- Later-Round Financing
- Preferred Stock Valuation
- Exit Strategies

See the website for more information about the program.

Fees

\$11,350

Fees include lodging and meals.

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <https://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/venture-capital>

Conference: Private Equity Summit - West Coast

Start Date: April 28, 2020

Organizer: Institutional Investor

End Date: April 28, 2020

Location: Los Angeles, California

Alternative Date(s) & Location(s) N/A

Topic Area: Investments

Attendance: By Invitation Only

Soaring asset prices and growing stockpiles of dry powder have the thousands of GPs and LPs in the approximately \$6 trillion private equity and debt ecosystem on edge. The upshot is that GPs are becoming more creative and LPs more responsive. Innovative data analysis, deal customization and new liquidity pools are going mainstream. At the same time, mega-funds are proliferating—including in 2019 the largest ever tech fund and buyout fund. Are growth and IPO withdrawals sustainable? How are geopolitical friction, macroeconomic uncertainty and the looming U.S. Presidential election influencing asset allocation decision-making? Are views on relative valuations changing? At this summit, GPs and LPs will meet to compare notes on the current investment opportunity set in private equity, VC and debt. What are GPs and LPs doing to enhance their respective investment processes and improve investment outcomes? How are faster fund cycles and longer investment horizons shaping LP appetite going into 2020?

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer.

Contact

Scott Cohen

Phone: (212) 224-3647

Fax: (212) 224-3802

Email

scott.cohen@iiforums.com

Link: <https://www.iiconferences.com/Institutional-Investor-Forums/Private-Equity-Summit-West-Coast>

Conference: Public Funds Roundtable

Start Date: April 29, 2020

Organizer: Institutional Investor

End Date: May 01, 2020

Location: Los Angeles, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: By Invitation Only

Your life is consumed by noise. Jim Cramer on CNBC frantically gesticulating about the latest 2% "correction". A board member asking exhausting questions about the latest non-event in trade negotiations. A participant wanting to know, ex post, why you invested in that strategy that underperformed over a three-month timeframe. And yes, even Institutional Investor occasionally stretching for its seventh published story of the day. This Roundtable is about everything else. It's about the indispensable, not the disposable, of being a public pension investing leader in 2020. It's about the essential.

See the website for more information about the conference.

Fees

Not available. Registration limited to investment executives from pension funds. Please contact the conference organizer to register.

Contact

Katarina Storfer
Phone: (212) 224-3073
Fax: (212) 224-3802

Email

kstorfer@institutionalinvestor.com

Link: <https://www.iiconferences.com/Institutional-Investor-Conferences/Public-Funds-Roundtable>

Conference: Leadership Development Conference

Start Date: April 30, 2020

Organizer: The Conference Board

End Date: May 01, 2020

Location: New York, New York

**Alternative Date(s)
& Location(s)** June 4-5, 2020, Chicago IL

Topic Area: Human Resources

Attendance: Open To All

This conference will examine the latest best practices, strategies, and success stories for transforming the world of leadership. The focus will be on innovative and superior practices and mindsets necessary to advance your leadership development into the future. Participants will have the opportunity to engage in a highly interactive and human centered conference experience.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,495 - members
\$400 discount for registering by February 22, 2020

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/leadershipdevelopment>

Conference: Washington Legislative Update

Start Date: May 04, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: May 05, 2020

Location: Washington, District of Columbia

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Legislation

Attendance: Open To All

This conference will address potential changes to tax policy, entitlement programs, health care and retirement. Hear from Washington insiders and experts in their fields at a time when the legislative and regulatory agenda is evolving. Topics include:

- 2019 Political Landscape
- Movement Toward State Activity
- Future of Work and Retirement
- Single/Multiemployer/Public Sector Challenges and Opportunities
- Fiduciary Discussion
- Health Care Plan Issues and Developments
- Update on Labor and Employment Law
- Retirement Plan Issues and Developments
- Long-Term Economic Issues and Policy Implications
- Communicating with Stakeholders

See the website for more information about the conference.

Fees

\$1,800 - non-members
\$1,580 - IFEBP members
Discount of \$300 for registration
by March 23, 2020

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/schedule/Pages/washington-legislative-update-2012.aspx>

Conference: Managing Longevity Risk: New Public/Private Perspectives

Start Date: May 07, 2020

Organizer: Pension Research Council, The Wharton School

End Date: May 08, 2020

Location: Philadelphia, Pennsylvania

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Pension Plan Policy

Attendance: By Invitation Only

This symposium discusses what rising longevity means for our future, how people perceive longevity risk, and the economics and psychology of working longer. Case studies focus on partnerships between public and private sector firms in the aging economy, including new products for plan sponsors, benefits specialists, actuaries, academics, regulators, and plan participants.

The symposium is for members only and by invitation. Please visit the website and log in for more information.

Fees

Not available. Please contact
conference organizer.

Contact

Phone: 215.898.0424
Fax: 215.573.3418

Email

prc@wharton.upenn.edu

Link: <https://pensionresearchcouncil.wharton.upenn.edu/conferences/>

Conference: Trustee Education Seminar

Start Date: May 09, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 10, 2020

Location: Las Vegas, Nevada

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Board Governance & Leadership

Attendance: Members Only

This seminar is held in conjunction with the Annual Conference and Exhibition. It is intended for new and novice trustees who are seeking a better understanding of their role and responsibilities as trustee of their pension fund. It also serves as a refresher for experienced trustees interested in staying up-to-date.

The program is designed with a clear focus on the educational needs of trustees who are relatively new to a pension plan board. The focus is on investing principles, board policies, and fundamental concepts that every trustee should know.

More information about the conference is not yet available.

Fees

\$460 - with early registration

Contact

Alyssa Carlson
Phone: 202-624-1456

Email

registration@ncpers.org

Link: <http://www.ncpers.org/teds>

Conference: Accredited Fiduciary (NAF) Program

Start Date: May 09, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 10, 2020

Location: Las Vegas, Nevada

**Alternative Date(s)
& Location(s)** Oct. 24-25, 2020, Nashville TN

Topic Area: Board Governance & Leadership

Attendance: Members Only

This is a trustee accreditation program specifically designed and tailored for individuals involved in public pension governance. It divides plan governance, oversight and administration into four modules. Each module delves into the fundamental components and strategies necessary for governing a public pension fund, allowing trustees and plan staff to walk away with the key competencies critical to their fiduciary responsibilities. The modules are offered two at a time (1&2 and 3&4), twice a year, and may be taken in any order. It is recommended that candidates first complete the Trustee Educational Seminar (TEDS).

Module 1 – Governance and the Board's Role
Module 2 – Investment and Finance
Module 3 – Legal, Risk Management and Communication
Module 4 – Human Capital

See the website for more information about the program.

Fees

Not yet available.
October 2019 fees:
\$1,020 - for two modules
\$205 discount for early
registration.

Contact

Alyssa Carlson
Phone: 202-624-1456

Email

registration@ncpers.org

Link: <https://www.ncpers.org/naf>

Conference: Program for Advanced Trustee Studies (PATs)

Start Date: May 09, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 10, 2020

Location: Las Vegas, Nevada

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Board Governance & Leadership

Attendance: Members Only

This program is designed for advanced trustees who seek a more intensive, in-depth learning experience. Held annually in conjunction with the Annual Conference & Exhibition, each year's program will focus on two topics of particular importance to pension plan trustees, enabling participants to dig deeper and fully explore issues with their counterparts from around the nation. Topics may include ethics, legal developments, and alternative investments, among other timely themes.

The program, developed more than a decade ago in consultation with Harvard Law School, is formatted to foster dialogue and interaction among attendees.

More information about the conference is not yet available.

Fees

\$460 - with early registration

Contact

Alyssa Carlson
Phone: 202-624-1456

Email

registration@ncpers.org

Link: <http://www.ncpers.org/teds>

Conference: Annual Conference and Exhibition

Start Date: May 10, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: May 13, 2020

Location: Las Vegas, Nevada

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Healthcare

Attendance: Members Only

More than 1,000 trustees, administrators, state and local officials, investment, financial and union officers, pension staff and regulators attend this conference each year. Attendees benefit from the comprehensive educational programming, dynamic speakers, and networking opportunities with money managers, investment service providers and public fund colleagues from across the nation.

More information about the conference is not yet available.

Fees

\$815 - with early registration

Contact

Alyssa Carlson
Phone: 202-624-1456

Email

registration@ncpers.org

Link: <http://www.ncpers.org/ace>

Course: Human Resources & Compensation Committee Effectiveness

Start Date: May 11, 2020

Organizer: Institute of Corporate Directors

End Date: May 11, 2020

Location: Toronto, Ontario, Canada

Alternative Date(s) & Location(s) June 1, 2020, Calgary AB

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: April 14, 2019

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/HR-Compensation-Committee-Effectiveness.aspx>

Conference: Spring Conference

Start Date: May 12, 2020

Organizer: State Association of County Retirement Systems (SACRS)

End Date: May 15, 2020

Location: San Diego, California

Alternative Date(s) & Location(s) N/A

Topic Area: General

Attendance: Open To All

The State Association of County Retirement Systems (SACRS) is an association of 20 California county retirement systems, enacted under the County Employees Retirement Law of 1937. Its semi-annual conferences provide relevant, actionable intelligence on fiduciary responsibility, investment management strategies and recent legislation impacting its member systems' pension programs. These conferences and other SACRS' events provide a platform for trustees, staff and our affiliate members to exchange ideas and best practices on pension administration.

See the website for more information about the conference.

Fees

Not yet available.
Last year's fees: \$120 - system and other non-profit member
\$2,670 - non-member
Registration opens Jan 2020.

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

Link: <https://sacrs.org/Events/Spring-Conference>

The Cortex Report prepared for the San José Retirement Boards

Conference: Annual Conference

Start Date: May 17, 2020

Organizer: CFA Institute

End Date: May 20, 2020

Location: Atlanta, Georgia

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

The conference will feature presentations from noted investors, geopolitical experts, best-selling authors, leading researchers, and successful practitioners, covering alternative investing, wealth management, global trends, career development, technology and investing, sustainable investing, psychology and decision making, and more.

See the website for more information about the conference.

Fees

\$1,595 - non-members
\$1,395 - CFA members
\$100 discount for registration by March 31, 2020.

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: +1 (434) 951-5262

Email

program@cfainstitute.org

Link: https://annual.cfainstitute.org/?s_cid=dsp_AnnualConference2020_CFAEnterpriseSite_AC73Home_LearnMore_300

Conference: Annual Conference

Start Date: May 17, 2020

Organizer: Government Finance Officers Association (GFOA)

End Date: May 20, 2020

Location: New Orleans, Louisiana

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

The Government Finance Officers Association (GFOA) represents public finance officials throughout the United States and Canada. GFOA's mission is to advance excellence in public finance. It provides best practice guidance, consulting, networking opportunities, publications, recognition programs, research, and training opportunities for those in the profession.

See the website for more information about the conference.

Fees

\$690 - non-members
\$535 - members
\$75 discount for registration by April 16, 2020

Contact

Phone: (312) 977-9700
Fax: (312) 977-4806

Email

Link: <https://gfoa.org/annual-conference/annual-conference-overview>

Conference: Discussion Forum

Start Date: May 31, 2020

Organizer: International Centre for Pension Management (ICPM)

End Date: June 03, 2020

Location: Toronto, Ontario, Canada

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: By Invitation Only

ICPM organizes two Discussion Forums each year that bring together ICPM's Research Partners with leading authorities from academia and policy-making circles to network and build knowledge about critical issues facing the pension system. Held in different parts of the world, Discussion Forums provide a collegial setting for senior executives in the ICPM network and other distinguished pension and investment practitioners to exchange ideas on key pension management topics. In addition, these events feature presentations by academic researchers on findings from ICPM-sponsored research. Research papers, presentation materials and case studies presented at past Discussion Forums are available as a resource for ICPM's Research Partners on global best practices. Summaries of key insights are also provided.

More information about the Forum is not yet available.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 416.925.4153

Email

icpm@icpmnetwork.com

Link: <https://icpmnetwork.com/company/roster/companyRosterDetails.html?companyId=18845&companyRosterId=47>

Course: Investment Strategies and Portfolio Management

Start Date: June 01, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: June 05, 2020

Location: Philadelphia, Pennsylvania

**Alternative Date(s)
& Location(s)** Nov. 16-20, 2020, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program provides a solid understanding of today's investment landscape and the tools and theories for developing and measuring the performance of portfolios. It provides actionable theories and practical tools for addressing asset allocation, risk management, performance measurement, and investment policies. It explores individual asset classes, including bonds, hedge funds, private equity, derivatives, real estate, and international markets to help participants better understand when to include these investments in their portfolios. Topics include:

- Modern Portfolio Theory
- Performance Measurement
- Evaluating Managers and Strategies
- Advanced Asset Allocation
- Investment Policy
- Outlook for the Economy and Navigating Its Risk

See the website for more information about the program.

Fees

\$11,280

Fees include lodging and most meals.

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/investment-strategies-and-portfolio-management>

Course: Human Resources & Compensation Committee Effectiveness

Start Date: June 01, 2020

Organizer: Institute of Corporate Directors

End Date: June 01, 2020

Location: Calgary, Alberta, Canada

Alternative Date(s) & Location(s) May 11, 2020, Toronto ON

Topic Area: Human Resources

Attendance: Open To All

This course was created to help directors develop deeper insights into issues such as CEO succession planning, executive compensation and incentive plans, human capital development beyond the CEO, and dealing with increased scrutiny of executive compensation plans by activist shareholders and proxy advisors.

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: May 4, 2020.

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/HR-Compensation-Committee-Effectiveness.aspx>

Conference: Leadership Development Conference

Start Date: June 04, 2020

Organizer: The Conference Board

End Date: June 05, 2020

Location: Chicago, Illinois

Alternative Date(s) & Location(s) Apr. 30 - May 1, 2020, New York NY

Topic Area: Human Resources

Attendance: Open To All

This conference will examine the latest best practices, strategies, and success stories for transforming the world of leadership. The focus will be on innovative and superior practices and mindsets necessary to advance your leadership development into the future. Participants will have the opportunity to engage in a highly interactive and human centered conference experience.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,495 - members
\$400 discount for registering by March 28, 2020

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/leadershipdevelopmentconference>

Conference: Plan Sponsor National Conference

Start Date: June 08, 2020

Organizer: Plan Sponsor

End Date: June 10, 2020

Location: Orlando, Florida

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

This conference brings together a cross section of the industry — plan sponsors, retirement plan advisers and providers, legislative and legal experts — to share insight and education that can help them build plans of excellence. The conference will cover the latest trends and best practices; ideas in retirement plan design; investment options and solutions; and legislative and regulatory changes.

More information about the conference is not yet available.

Fees

Not yet available.

Contact

Carol Popkins
Phone: 203-461-0985

Email

carol.popkins@issmediasolutions.com

Link: <https://www.plansponsor.com/events/2020psnc/>

Course: Board Oversight of Strategy

Start Date: June 08, 2020

Organizer: Institute of Corporate Directors and Rotman School of Management (U of

End Date: June 08, 2020

Location: Toronto, Ontario, Canada

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course will help directors successfully engage in the strategic oversight process. Developed in partnership with CPA Canada and based on CPA Canada's Overseeing Strategy: A Framework for Boards of Directors, participants will learn how to apply the four-phase framework, when to get involved and how to effectively participate in board oversight activities in different situations and business environments.

See the website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: May 11, 2020

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <https://www.icd.ca/Courses/Short-Courses/Board-Oversight-of-Strategy.aspx>

Conference: Annual Conference

Start Date: June 08, 2020

Organizer: International Corporate Governance Network (ICGN)

End Date: June 10, 2020

Location: Toronto, Ontario, Canada

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Corporate Governance

Attendance: Members Only

This conference will be hosted by the Ontario Teachers Pension Plan, in partnership with the Royal Bank of Canada.

This year's conference celebrates ICGN's 25th year. The ICGN now represents over 790 members in 50 countries - with institutional investor members responsible for over \$34 trillion in assets under management. Accordingly, this conference will take stock of what we have learned and achieved over the past 25 years, but also look to the future with regard to priorities for reform. As the governance and investor stewardship landscape continues to evolve, leading expert speakers will provide attendees with key insights into best practice and highlight future priorities for companies, investors and stakeholders.

See the website for more information about the conference.

Fees

£1,100 - non-member
£800 - member

Contact

Elle Thomas
Head of Communications &
Events
Phone: +44 (0) 207 612 7011

Email

elizabeth.thomas@icgn.org

Link: <https://www.icgn.org/events/icgn-2020-annual-conference-toronto>

Conference: Public Employee Benefits Institute

Start Date: June 29, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: July 01, 2020

Location: San Francisco, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

The public sector has faced unique challenges in recent years with budget cuts and media attention on benefit plans. The Institute is dedicated to addressing the benefits topics most critical to public plans.

More information about the conference is not yet available.

Fees

\$2,180 - non-members
\$1,850 - IFEBP members
\$300 discount for registration by
May 18, 2020

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/TrusteesAdmin/Pages/public-sector-benefits-institute-2009pe.aspx>

Conference: Trustee Workshop

Start Date: July 19, 2020

Organizer: National Council on Teacher Retirement (NCTR)

End Date: July 22, 2020

Location: Berkeley, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Members Only

The National Council on Teacher Retirement (NCTR) is constituted as an independent association dedicated to safeguarding the integrity of public retirement systems in the United States and its territories to which teachers belong and to promoting the rights and benefits of all present and future members of the systems.

This workshop is presented in affiliation with the UC Berkeley Center for Executive Education at the Haas School of Business. It is developed with input from board trustees on the NCTR Trustee Education Committee and is designed by and for public pension board trustees. Workshop agenda items offer a wide range of educational content for both new and experienced trustees.

More information about the workshop is not yet available.

Fees

\$2,550

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

rwheeler@nctr.org

Link: <https://nctr.org/upcoming-events/workshops-2/>

Course: Alternative Investment Strategies

Start Date: July 20, 2020

Organizer: Wharton School, University of Pennsylvania - for the IFEBP

End Date: July 22, 2020

Location: San Francisco, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

This program provides practical education to help you understand the complexities of alternative investments. Focused on the topics of hedge funds and real estate investing for benefit funds, this advanced-level program will provide you with the tools to make effective investment decisions. Topics include:

- Introduction and Overview of Hedge Funds and Other Alternative Investments
- Institutional Interest in Hedge Funds and Hedge Fund Styles and Flows
- Hedge Fund Investing
- Lessons From Hedge Fund Failures and Topics in Hedge Fund Allocation
- Other Alternative Investment Trends and the Future
- Equity Investments in Real Estate
- Debt Investments in Real Estate

See the website for more information about the program.

Fees

\$4,755 - non-members
\$4,455 - members
\$300 discount for registration by
June 8, 2020

Contact

Toll-free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/wharton/Pages/alternative-investment-strategies-20h5.aspx>

Conference: Chief Officers Summit

Start Date: July 22, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: July 24, 2020

Location: Chicago, Illinois

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

This summit is the culmination of extensive research and engagement with NCPERS membership and builds upon the successful launch of the CIO Summit in June 2018. The program features dual tracks for CIOs and CEOs. Both programs focus on the distinct challenges mid-market plans face and provide plan executives the opportunity to work together in solutions-focused small group discussions. The agendas, created by advisory faculties of CIO and CEO peers, will feature:

- A target audience of chief officers from funds with assets between \$2 billion and \$60 billion.
- Solutions-focused group discussions after each general session.
- Limited attendees to promote active participation and discussion.
- Educational tracks closed to marketers from the vendor community.

Fees

Not yet available.
Last year's fees:
\$1,000 - non-members
\$650 - members

Contact

Alyssa Carlson
Phone: 202-624-1456

Email

registration@ncpers.org

Link: <https://www.ncpers.org/cos>

Conference: CFA Institute Seminar for Global Investors

Start Date: July 22, 2020

Organizer: CFA Institute - Hosted by CFA Society Chicago

End Date: July 25, 2020

Location: Chicago, Illinois

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

This seminar (previously known as the Financial Analysts Seminar), held each year for the last 64 years, gathers a faculty of leading investors and researchers to provide their insights, perspectives, and practical takeaways to a global audience of asset managers and asset owners. With the objective of improving investment decisions, participants at the seminar study an array of investment topics such as:

- Effects of global macroeconomic trends,
- Geopolitics
- Investment policy
- Improving data analysis
- Application of new technologies in traditional and quantitative portfolio management,
- Development and allocation of a range of investment strategies, asset classes, and risks.

See the website for more information about the seminar.

Fees

Not yet available.
Last year's fees:
\$3,495
\$2,995 - CFA members
\$500 early bird discount

Contact

Phone: +1-434-951-5499
Fax: +1 (434) 951-5262
Toll-free: 1-800-247-8132

Email

programs@cfainstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences/past/seminar-for-global-investors>

Course: Public Pension Investment Management Program

Start Date: July 26, 2020

Organizer: SACRS & Haas School of Business, UC Berkeley

End Date: July 29, 2020

Location: Berkeley, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Members Only

This course, Modern Investment Theory & Practice for Retirement Systems, is a four-day course offering SACRS' members in-depth knowledge on today's successful investment models and strategies. They will learn how to practically integrate these methods immediately into their own plan administration, advancing their skills and elevating the collective expertise of SACRS' membership. Completion of the course earns them a certificate of achievement from UC Berkeley.

This program is widely popular and limited to 30-40 people. System members have registration priority.

See the website for more information about the program.

Fees

Not yet available.
Last year's fees: \$2,500

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

Link: <https://sacrs.org/Events/SACRS-UC-Berkeley-Program>

Conference: Private Equity Exclusive

Start Date: July 27, 2020

Organizer: Pension Bridge

End Date: July 28, 2020

Location: Chicago, Illinois

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

Amid sustained volatility in the public markets and peak cycle uncertainty, this conference will focus on the most important issues, outlooks, challenges, opportunities and trends that will shape the Private Equity Industry for today and the future.

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 561-455-2729

Fax: 561-258-8258

Email

info@pensionbridge.com

Link: <https://www.pensionbridge.com/exclusive>

Conference: Annual Conference

Start Date: August 08, 2020

Organizer: National Association of State Retirement Administrators (NASRA)

End Date: August 12, 2020

Location: Park City, Utah

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Members Only

NASRA was founded in 1955 as a non-profit association whose members are the directors of the nation's state, territorial, and largest statewide public retirement systems. Its members oversee retirement systems that hold more than two-thirds of the \$4.2 trillion held in trust for 15 million working and 10 million retired employees of state and local government. Its mission is to serve its members in managing sustainable public employee retirement systems through research, education, and collaboration.

The annual conference features leaders in the fields of retirement plan investment and administration covering a variety of subjects including investment management, world events applicable to the pension industry, the economy, human resources, trends, and more.

More information about the conference is not yet available.

Fees

Not yet available

Contact

Mary Hiatte
Phone: 202.624.1418

Email

mary@nasra.org

Link: <http://www.nasra.org/meetings>

Conference: Public Pension Funding Forum

Start Date: August 23, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: August 25, 2020

Location: Chicago, Illinois

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Pension Plan Policy

Attendance: Open To All

The issue of pension funding gap, real or not, is often used to change pension plans as we know them. The most common solutions revolve around increasing employee and employer contributions, reducing benefits, and converting lifetime guarantee of defined benefit pensions into do it yourself pension schemes.

This forum will examine the obstacles that stand in the way of closing public pension funding gap and explore new solutions to overcome such obstacles, including better risk management in economic cycles, use of new and improved debt instruments, and closing tax loopholes.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$785
\$100 discount for early
registration.

Contact

Alyssa Carlson
Phone: 202-624-1456

Email

registration@ncpers.org

Link: <https://www.ncpers.org/fundingforum>

Course: Principles of Pension Governance for Trustees

Start Date: August 25, 2020

Organizer: CALAPRS - In association with Pepperdine University

End Date: August 28, 2020

Location: Malibu, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Members Only

The California Association of Public Retirement Systems (CALAPRS) sponsors educational forums for sharing information and exchanging ideas among trustees and staff of California public retirement systems to enhance their ability to administer public pension plan benefits and manage investments consistent with their fiduciary responsibility. CALAPRS carries out its mission through an annual conference called the General Assembly, round table meetings for discussion of topics of interest, and the annual Principles of Pension Governance courses.

More information about the course is available exclusively to CALAPRS member systems and sponsors. Please visit the website and log in.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 415-764-4860
Toll-free: 1-800-RETIRE-0
Fax: 415-764-4915

Email

register@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1276559&group=>

Course: Governing for Nonprofit Excellence: Critical Issues for Board

Start Date: September 09, 2020

Organizer: Harvard Business School, Harvard University

End Date: September 12, 2020

Location: Cambridge, Massachusetts

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Board Governance & Leadership

Attendance: Open To All

This program delves into the critical issues facing nonprofit board leaders. You will examine the latest governance frameworks, performance and measurement systems, oversight models for ensuring accountability and compliance, and the dynamics between boards and CEOs. As you gain insight into four essential competencies of nonprofit governance—board leadership, strategic stewardship, performance measurement, and financial oversight—you will learn how to drive the strategic and organizational transformation that enables your nonprofit organization to thrive. With a deeper understanding of board roles and responsibilities, you will emerge a stronger leader and a more strategic steward for your organization.

See the website for more information about the program.

Fees

\$5,000
Covers tuition, books,
accommodation & most meals

Contact

Phone: +1-617-495-6555
Toll-free: 1-800-427-5577

Email

executive_education@hbs.edu

Link: <https://www.exed.hbs.edu/governing-nonprofit-excellence-critical-issues-board-leadership/>

Conference: Retirement Income

Organizer: Pensions & Investments

Location: San Francisco, California

Start Date: September 15, 2020

End Date: September 15, 2020

Alternative Date(s) & Location(s) September 17, 2020, New York NY

Topic Area: Investments

Attendance: By Invitation Only

This conference will provide a platform to discuss and debate how to provide plan participants with the tools and strategies designed to achieve the most stable and consistent income stream possible given the retiree's overall wealth and anticipated Social Security income. Specifically, how can retirement savings be optimally invested and allocated pre and post-retirement and what factors should be considered when annuitizing?

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/retirement-income/2020>

Conference: Retirement Income

Organizer: Pensions & Investments

Location: New York, New York

Start Date: September 17, 2020

End Date: September 17, 2020

Alternative Date(s) & Location(s) September 15, 2020, San Francisco CA

Topic Area: Investments

Attendance: By Invitation Only

This conference will provide a platform to discuss and debate how to provide plan participants with the tools and strategies designed to achieve the most stable and consistent income stream possible given the retiree's overall wealth and anticipated Social Security income. Specifically, how can retirement savings be optimally invested and allocated pre and post-retirement and what factors should be considered when annuitizing?

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/retirement-income/2020>

Conference: Fall Conference

Start Date: September 21, 2020

Organizer: Council of Institutional Investors

End Date: September 23, 2020

Location: San Francisco, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Corporate Governance

Attendance: Members Only

The Council of Institutional Investors (CII), is a nonprofit, nonpartisan association of U.S. asset owners, primarily pension funds, state and local entities charged with investing public assets and endowments and foundations, with combined assets of \$4 trillion. Its associate members include non-U.S. asset owners with more than \$4 trillion in assets and a range of asset managers with more than \$35 trillion in assets under management. CII is a leading voice for effective corporate governance, strong shareowner rights and vibrant, transparent and fair capital markets.

More information about the conference is not yet available.

Registration will open in May 2020.

Fees

No charge for members.
Please contact the conference organizer to become a member and register.

Contact

Michael Miller
Phone: 202.822.0800

Email

michael@cii.org

Link: https://www.cii.org/ev_calendar_day.asp?date=9/21/2020&eventid=48

Course: Certificate of Achievement in Public Plan Policy - Part I

Start Date: September 22, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBP)

End Date: September 23, 2020

Location: Santa Monica, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

This program addresses the fundamental areas involved in managing employee pension plans. Topics include:

- Governance - Overview of the governance of public pension and health plans including a broad-based orientation addressing issues, duties and responsibilities.
- Fiduciary Responsibilities - Overview of the legal environment in which public plans operate, review of fiduciary duties and the role of fiduciary decision making.
- Legal, Legislative & Regulatory Developments - Evolution of public plans and regulations, current rules and regulations of significance, tax deferral plans and their role in retirement income, challenges and benefits of public sector plans, and possible outlook for future legislative and regulatory activity
- Actuarial Principles - Review of the role and function of actuaries, applicable pension plan policies, cash flow characteristics, basic methods and assumptions for evaluating future events and much more.

See the website for more information about the program.

Fees

\$1,695 - non-members
\$1,475 - members
\$300 discount for registration by August 13, 2020

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/capp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-capp-pension-part-i-20a1.aspx>

Course: Certificate of Achievement in Public Plan Policy - Part II

Start Date: September 24, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: September 25, 2020

Location: Santa Monica, California

Alternative Date(s) & Location(s) N/A

Topic Area: General

Attendance: Open To All

Part II addresses the elements of plan design, investments, business improvement strategies and emerging issues. Topics include:

- Plan Design - Review of basic retirement plan components, features that are unique to public plans, the structure of alternative plan design, how the legislative landscape plays into the equation and adequacy funding and risks of retirement.
 - Investments - Asset allocation strategies and different asset classes, setting goals and objectives for developing an investment policy, selecting and monitoring investment performance and the components of an investment report.
 - Business Improvement Strategies - Strategic planning to improve the most important aspects of your organization, tools and tips to improve risk assessment effectiveness and how to strategically analyze, audit and continuously improve your operations.
 - Emerging Issues - Overview of workforce attitudes and demographics, an explanation of tools for trustees and administrators and a review of emerging issues and hot topics.
- See the website for more information about the program.

Fees

\$1,695 - non-members
\$1,475 - members
\$300 discount for registration by August 13, 2020

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/capp/schedule/Pages/certificate-of-achievement-in-public-plan-policy-capp-pension-part-ii-20a2.aspx>

Conference: Global Markets

Start Date: September 29, 2020

Organizer: Pensions & Investments

End Date: September 29, 2020

Location: Chicago, Illinois

Alternative Date(s) & Location(s) October 1, 2020, New York NY

Topic Area: Investments

Attendance: By Invitation Only

This conference will provide an update on trends in the global economy, where the opportunities and challenges are, and what are the best methods for accessing specific markets. Whether investors are new to investing in global growth markets or are looking to update their strategies, this conference will provide the background and information needed to create a global growth markets strategy that fits each fund's objectives.

- How to access the best opportunities and further diversify your portfolio with a global strategy
- Best practices in due diligence, including ESG considerations, and how to source best in class investment managers
- When does local expertise matter? How can you best invest globally with the resources you have?
- Which investment vehicles present the best opportunities in which markets and what is the right mix?

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/global-markets/2020/>

Conference: Annual Institutional Investor Real Estate Conference

Start Date: September 30, 2020

Organizer: Pension Real Estate Association (PREA)

End Date: October 02, 2020

Location: Boston, Massachusetts

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

The Pension Real Estate Association (PREA) is a non-profit trade association for the global institutional real estate investment industry. PREA currently lists over 700 corporate member firms across the United States, Canada, Europe and Asia. Its members include public and corporate pension funds, endowments, foundations, Taft-Hartley funds, insurance companies, investment advisory firms, REITs, developers, real estate operating companies and industry service providers.

PREA holds two major conferences each year: the Spring Conference and the Annual Institutional Investor Real Estate Conference.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's conference fees:
\$525 - non-member
\$150 - member

Contact

Amy Laffargue
Director, Meetings and Events
Phone: 860-785-3846
Fax: 860-692-6351

Email

amy@prea.org

Link: <https://www.prea.org/events/upcoming-events/>

Course: Audit Committee Effectiveness

Start Date: September 30, 2020

Organizer: Institute of Corporate Directors

End Date: September 30, 2020

Location: Winnipeg, Manitoba, Canada

**Alternative Date(s)
& Location(s)** March 23, 2020, Halifax NS
April 8, 2020, Vancouver BC

Topic Area: Board Governance & Leadership

Attendance: Open To All

This course is designed to help directors be most effective on the audit committee and move beyond the traditional role of compliance oversight. Dig into topics from annual work plans to management and auditor relationships to emerging national and global issues.

See website for more information about the program.

Fees

\$1,395 CAD - for non-members
\$1,050 CAD - for ICD members
\$950 - for ICD directors
Application deadline: September 2, 2020

Contact

Maureen Finlan
Phone: 416.593.7741 ext. 248
Toll-free: 1.877.593.7741
Fax: 416.593.0636

Email

mfinlan@icd.ca

Link: <http://www.icd.ca/Courses/Short-Courses/Audit-Committee-Effectiveness.aspx>

Conference: Global Markets

Organizer: Pensions & Investments

Location: New York, New York

Start Date: October 01, 2020

End Date: October 01, 2020

Alternative Date(s) & Location(s) September 29, 2020, Chicago IL

Topic Area: Investments

Attendance: By Invitation Only

This conference will provide an update on trends in the global economy, where the opportunities and challenges are, and what are the best methods for accessing specific markets. Whether investors are new to investing in global growth markets or are looking to update their strategies, this conference will provide the background and information needed to create a global growth markets strategy that fits each fund's objectives.

- How to access the best opportunities and further diversify your portfolio with a global strategy
- Best practices in due diligence, including ESG considerations, and how to source best in class investment managers
- When does local expertise matter? How can you best invest globally with the resources you have?
- Which investment vehicles present the best opportunities in which markets and what is the right mix?

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/global-markets/2020/>

Conference: Fall Conference

Organizer: Journal of Investment Management

Location: Atlanta, Georgia

Start Date: October 05, 2020

End Date: October 06, 2020

Alternative Date(s) & Location(s) N/A

Topic Area: Investments

Attendance: Open To All

This conference is titled Applications of Data Science in Investment Management. The main focus of the conference will be on AI in investment management. Industry is rapidly incorporating machine learning methods into investment management as a complement to standard econometric approaches. The conference will feature early exemplars of this methodological shift. This event is co-sponsored with the Scheller College of Business, Georgia Tech, Invesco, BlackRock and Franklin Templeton. Featured presenters:

Sudheer Chava, Georgia Tech
Tucker Balch, Georgia Tech/JP Morgan
Sanjiv Das, Santa Clara University
Alessio de Longis, Invesco
Vasant Dhar, New York University
Marty Flannagan, Invesco
Bryan Kelly, Yale University
Deep Srivastav, Franklin Templeton
See the website for more information about the conference.

Fees

\$3,000 - guest seat (based on availability)
\$5,000 - annual membership (includes Spring & Fall Conferences)

Contact

Phone: (925) 299-7800
Fax: (925) 299-7815

Email

customerservice@joim.com

Link: <https://www.joim.com/conference-series/>

Conference: Investment Conference

Start Date: October 05, 2020

Organizer: BCA Research - Approved by the CFA Institute

End Date: October 06, 2020

Location: New York, New York

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

BCA is an independent provider of global investment research. Since 1949, its mission has been to support its clients in making better investment decisions through the delivery of leading-edge analysis and forecasts of all the major asset classes and economies, as well as educating, informing and stimulating discussion through clear and thought-provoking research.

The annual conference features an agenda of thought leaders covering important themes in the worlds of finance, economics, and politics. It will shape your conviction and help you discover investment opportunities as you connect with asset allocation professionals from around the globe.

See the website for more information about the conference.

Fees

\$3,995
Ask the conference organizer about special discounts for clients and past attendees.

Contact

Phone: +1 514 499 9550
Toll-free: 1 800 724 2942

Email

support@bcaresearch.com

Link: <https://www.bcaresearch.com/conference2020>

Conference: Talent Acquisition Conference

Start Date: October 06, 2020

Organizer: The Conference Board

End Date: October 07, 2020

Location: New York, New York

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Human Resources

Attendance: Open To All

This conference will explore strategies and innovations for attracting top talent in order to stay ahead of your competitors into the next decade. Through a combination of keynote addresses, breakout sessions, and roundtable discussions, you will learn how to build a future workforce by hiring the right job candidates today. You will:

- Learn from leading practitioners, including members of The Conference Board
- Discover current trends and best practices for hiring tomorrow's workforce.
- Find out how new technology is impacting the TA function and strategy.
- Hear about techniques for winning the war on talent and attracting hard-to-find skill sets.
- Better understand AI, digitalization, and metrics that matter.
- Explore new recruiting methods and their value for attracting talent, eg. social media.
- Network, collaborate, and benchmark with your talent acquisition peers.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,495 - members
\$400 discount for registration by July 25, 2020

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/talent>

Conference: Annual Conference

Start Date: October 10, 2020

Organizer: National Council on Teacher Retirement (NCTR)

End Date: October 13, 2020

Location: La Jolla, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Members Only

The National Council on Teacher Retirement (NCTR) is constituted as an independent association dedicated to safeguarding the integrity of public retirement systems in the United States and its territories to which teachers belong and to promoting the rights and benefits of all present and future members of the systems. NCTR membership includes 68 state, territorial, and local pension systems. These systems serve more than 19 million active and retired teachers, non-teaching personnel, and other public employees; and have combined assets of over \$2 trillion in their trust funds.

More information about the conference is not yet available.

Fees

\$1,300
Fees increase to \$1,450 after
September 9, 2020.

Contact

Robyn Wheeler
Phone: (916) 509-7260

Email

rwheeler@nctr.org

Link: <https://nctr.org/upcoming-events/conference/>

Conference: Managing Pension Risk & Liabilities

Start Date: October 13, 2020

Organizer: Pensions & Investments

End Date: October 13, 2020

Location: Dallas, Texas

**Alternative Date(s)
& Location(s)** October 15, 2020, Atlanta GA
October 20, 2020, New York NY

Topic Area: Investments

Attendance: By Invitation Only

Pension funds have generally enjoyed funding status improvements over the past year, thanks to a prolonged bull market. Now, the challenge is to lock-in funded status gains. An important lesson learned by pension funds is that growth assets are needed to maintain funded status even when following an LDI strategy. Another important lesson learned in recent years is that risk management strategies must be customized to the fund, taking into consideration the fund's risk appetite, funding status, and end goal. Along with a customized strategy, funds need to create more customized benchmarks for measuring performance.

This conference will cover these and other topics including:

- Surveying the array of pension risk management strategies
- Using asset-liability modeling analysis to understand the plan's risk relative to liabilities
- Developing a glidepath that is both robust and nimble
- Creating a customized LDI strategy with customiz

See the website for more information about the conference.

Fees

Not available.
Please contact conference
organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/pension-risk/2020/>

Conference: Fixed Income Management

Start Date: October 15, 2020

Organizer: CFA Institute - Hosted with the CFA Society Boston

End Date: October 16, 2020

Location: Boston, Massachusetts

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

Covering practical topics that address fixed-income sectors, security selection, and portfolio construction, this conference brings together top researchers, strategists, analysts, and portfolio managers focused on uncovering investment ideas and strategies that can be used to successfully meet client objectives.

See the website for more information about the conference.

Fees

Not yet available.
Last year's conference fees:
\$1,595 - non-members
\$1,295 - CFA members
Registration to open in June/20

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: (434) 951-5262

Email

ceprogram@cfainstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences/FIM-2020>

Conference: Managing Pension Risk & Liabilities

Start Date: October 15, 2020

Organizer: Pensions & Investments

End Date: October 15, 2020

Location: Atlanta, Georgia

**Alternative Date(s)
& Location(s)** October 13, 2020, Dallas TX
October 20, 2020, New York NY

Topic Area: Investments

Attendance: By Invitation Only

Pension funds have generally enjoyed funding status improvements over the past year, thanks to a prolonged bull market. Now, the challenge is to lock-in funded status gains. An important lesson learned by pension funds is that growth assets are needed to maintain funded status even when following an LDI strategy. Another important lesson learned in recent years is that risk management strategies must be customized to the fund, taking into consideration the fund's risk appetite, funding status, and end goal. Along with a customized strategy, funds need to create more customized benchmarks for measuring performance.

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- Using asset-liability modeling analysis to understand the plan's risk relative to liabilities
- Developing a glidepath that is both robust and nimble
- Creating a customized LDI strategy with customiz

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/pension-risk/2020/>

Conference: Annual Conference

Start Date: October 17, 2020

Organizer: National Pension Education Association (NPEA)

End Date: October 21, 2020

Location: Seattle, Washington

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Pension Plan Policy

Attendance: Members Only

The NPEA is a national organization of public retirement systems that focuses on comprehensive retirement education for members of these systems. It provides a forum to educate public retirement system professionals and encourage the ongoing exchange of information and ideas in retirement planning and member communication. NPEA's goal is to assist public retirement system professionals with resources to anticipate the needs of their members as they plan a retirement that is emotionally, financially and socially satisfying.

See the website for more information about the conference.

Fees

Not yet available.

Contact

Aimee Rives, Administrator
Phone: 859-492-1693

Email

aimee.rives@gmail.com

Link: <http://npea.com/annual-conference>

Course: Private Equity: Investing and Creating Value

Start Date: October 19, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: October 23, 2020

Location: Philadelphia, Pennsylvania

**Alternative Date(s)
& Location(s)** April 20-24, 2020, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program is designed for institutional investors as well as investment professionals aspiring to be better private equity managers. It will deliver the latest information about the private equity sector, while teaching the concepts investors need to know to evaluate investment opportunities in the private equity space. Topics include:

- Fund Structure
- Leveraged Buyout Model and Comparables Analysis
- Deal Origination, Transaction, and Execution
- Value Creation With Operations and Negotiation
- Advanced And Best Practices In Private Equity
- Commercial Due Diligence
- The Limited Partners' Perspective
- Growth Equity
- Middle Market Private Equity
- Private Equity In Emerging Economies

See the website for more information about the program.

Fees

\$11,350
Fees include accommodations and meals.

Contact

Phone: 215.898.1776
Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/private-equity-investing-and-creating-value>

Conference: Managing Pension Risk & Liabilities

Start Date: October 20, 2020

Organizer: Pensions & Investments

End Date: October 20, 2020

Location: New York, New York

Alternative Date(s) & Location(s) October 13, 2020, Dallas TX
October 15, 2020, Atlanta GA

Topic Area: Investments

Attendance: By Invitation Only

Pension funds have generally enjoyed funding status improvements over the past year, thanks to a prolonged bull market. Now, the challenge is to lock-in funded status gains. An important lesson learned by pension funds is that growth assets are needed to maintain funded status even when following an LDI strategy. Another important lesson learned in recent years is that risk management strategies must be customized to the fund, taking into consideration the fund's risk appetite, funding status, and end goal. Along with a customized strategy, funds need to create more customized benchmarks for measuring performance.

This conference will cover these and other topics including:

- Surveying the array of pension risk management strategies
- Using asset-liability modeling analysis to understand the plan's risk relative to liabilities
- Developing a glidepath that is both robust and nimble
- Creating a customized LDI strategy with customiz

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/pension-risk/2020/>

Conference: Executive Compensation Conference

Start Date: October 22, 2020

Organizer: The Conference Board

End Date: October 23, 2020

Location: New York, New York

Alternative Date(s) & Location(s) N/A

Topic Area: Human Resources

Attendance: Open To All

This conference will address new and emerging executive compensation trends during the 2020 proxy season, and how to address them and prepare for 2021. It will discuss how companies are implementing SEC rules (e.g. Pay Ratio), improved incentive designs to ensure greater pay-for-performance alignment and much better communications as investors and other stakeholders are demanding enhanced disclosures. Other topics will include selecting performance metrics for short, medium and long-term and global issues in executive compensation, and Board of Directors compensation issues.

See the website for more information about the conference.

Fees

\$2,895 - non-members
\$2,495 - members
\$400 discount for registering by
August 15, 2020

Contact

Phone: +1 212 339 0345
Fax: +1 212 836 9740

Email

customer.service@conferenceboard.org

Link: <https://www.conference-board.org/execcomp>

Conference: Trustees' Roundtable

Start Date: October 23, 2020

Organizer: California Association of Public Retirement Systems (CALAPRS)

End Date: October 23, 2020

Location: San Jose, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Members Only

The California Association of Public Retirement Systems (CALAPRS) sponsors educational forums for sharing information and exchanging ideas among trustees and staff of California public retirement systems to enhance their ability to administer public pension plan benefits and manage investments consistent with their fiduciary responsibility. CALAPRS carries out its mission through an annual conference called the General Assembly, round table meetings for discussion of topics of interest, and the annual Principles of Pension Management course.

More information about the conference is available exclusively to CALAPRS member systems and sponsors. Please visit the website and log in.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 415-764-4860
Toll-free: 1-800-RETIRE-0
Fax: 415-764-4915

Email

info@calaprs.org

Link: <https://www.calaprs.org/events/EventDetails.aspx?id=1317767&group=>

Conference: Accredited Fiduciary (NAF) Program

Start Date: October 24, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 25, 2020

Location: Nashville, Tennessee

**Alternative Date(s)
& Location(s)** May 9-10, 2020, Las Vegas NV

Topic Area: Board Governance & Leadership

Attendance: Members Only

This is a trustee accreditation program specifically designed and tailored for individuals involved in public pension governance. It divides plan governance, oversight and administration into four modules. Each module delves into the fundamental components and strategies necessary for governing a public pension fund, allowing trustees and plan staff to walk away with the key competencies critical to their fiduciary responsibilities. The modules are offered two at a time (1&2 and 3&4), twice a year, and may be taken in any order. It is recommended that candidates first complete the Trustee Educational Seminar (TEDS).

Module 1 – Governance and the Board's Role
Module 2 – Investment and Finance
Module 3 – Legal, Risk Management and Communication
Module 4 – Human Capital

See the website for more information about the program.

Fees

Not yet available.
October 2019 fees:
\$1,020 - for two modules
\$205 discount for early registration.

Contact

Alyssa Carlson
Phone: 202-624-1456

Email

registration@ncpers.org

Link: <https://www.ncpers.org/naf>

Conference: Public Safety Conference

Start Date: October 25, 2020

Organizer: National Conference on Public Employee Retirement Systems

End Date: October 28, 2020

Location: Nashville, Tennessee

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Members Only

This conference is dedicated to providing quality education that is specifically tailored for the unique needs and demands of public safety pensions. Since 1985, it has educated hundreds of public safety pension trustees, administrators and staff; union officials; and local elected officials by featuring presentations from recognized leaders in both the worlds of finance and politics, providing news on the latest developments, and offering attendees the opportunity to network with fellow trustees.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees: \$815
\$100 discount for early registration

Contact

Alyssa Carlson
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Email

registration@ncpers.org

Link: <https://www.ncpers.org/Psc>

Conference: Annual Conference

Start Date: October 25, 2020

Organizer: Public Pension Financial Forum (P2F2)

End Date: October 28, 2020

Location: Philadelphia, Pennsylvania

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Operations

Attendance: Members Only

The Public Pension Financial Forum is organized for education, pension advocacy and networking purposes for public pension plans. To support the ongoing education of its membership, it prepares quarterly newsletters, holds member facilitated conference calls and hosts an annual conference at a North American location.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's conference fees:
\$525

Contact

Phone: 614-227-0059

Email

information@p2f2.org

Link: <https://www.p2f2.org/annualconference>

Conference: Annual Conference

Start Date: October 25, 2020

Organizer: American Society of Pension Professionals & Actuaries (ASPPA)

End Date: October 28, 2020

Location: Chicago, Illinois

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

ASPPA is a non-profit professional organization with two major goals: to educate retirement plan professionals, and to create a framework of public policy that gives every working American the ability to have a comfortable retirement. In pursuit of these goals, ASPPA offers its more than 7,000 members extensive educational opportunities, paired with a strong advocacy operation. While ASPPA began in 1966 as an actuarial organization, they have changed to reflect the shifts in the retirement plan industry. As a result, ASPPA now represents business owners, actuaries, TPAS, record keepers, consultants and more.

More information about the conference is not yet available.

Fees

Not yet available.
Last year's fees:
\$1,735 - non-members
\$1,430 - members

Contact

Phone: 703.516.9300
Fax: 703.516.9308

Email

customercare@asppa-net.org

Link: <http://asppaannual.org/conference/>

Conference: Alternatives Conference

Start Date: October 26, 2020

Organizer: Pension Bridge

End Date: October 27, 2020

Location: Chicago, Illinois

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

Pension Bridge provides exclusive events for senior executives within the institutional investment management industry. Bringing together attendees from North America's largest investors and global asset managers, its conferences offer an intimate environment to strengthen relationships, discuss market trends and challenges, and refresh your knowledge of the investment industry.

With the longest bull market in US history at an end, this conference will discuss how to avoid mistakes and generate alpha, in this extremely challenging investment era. Sharing their knowledge, speakers will provide insights into how portfolio construction, risk diversification and asset allocation will be key in avoiding the pitfalls as this extended cycle turns.

See the website for more information about the conference.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 561-455-2729
Fax: 561-258-8258

Email

info@pensionbridge.com

Link: <https://www.pensionbridge.com/alternatives>

Conference: The Evolution of OCIO

Start Date: November 04, 2020

Organizer: Pensions & Investments

End Date: November 05, 2020

Location: Boston, Massachusetts

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

This conference will address the 'why' and the 'how' of the model and will share best practices on how to implement, evaluate, benchmark and evolve for the best outcomes.

Some of the areas that will be addressed are:

- The advantages and challenges of hiring an OCIO provider
- Evaluating and measuring new and existing OCIO providers
- Strategic investing and how to use an OCIO provider to fulfill institutional mandates
- Investment manager due diligence & selection
- How portfolio performance should be measured and reported
- Investment fee negotiation & examining options - sliding, asset-based fees vs. performance-based fees

See the website for more information about the conference.

Fees

Not available.
Please contact conference organizer.

Contact

Diane Pastore
Director of Conference
Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/outsourcing-cios/2020/>

Conference: Discussion Forum

Start Date: November 08, 2020

Organizer: International Centre for Pension Management (ICPM)

End Date: November 11, 2020

Location: Washington, District of Columbia

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: By Invitation Only

ICPM organizes two Discussion Forums each year that bring together ICPM's Research Partners with leading authorities from academia and policy-making circles to network and build knowledge about critical issues facing the pension system. Held in different parts of the world, Discussion Forums provide a collegial setting for senior executives in the ICPM network and other distinguished pension and investment practitioners to exchange ideas on key pension management topics. In addition, these events feature presentations by academic researchers on findings from ICPM-sponsored research. Research papers, presentation materials and case studies presented at past Discussion Forums are available as a resource for ICPM's Research Partners on global best practices. Summaries of key insights are also provided.

More information about the forum is not yet available.

Fees

Not available. Please contact the conference organizer.

Contact

Phone: 416.925.4153

Email

icpm@icpmnetwork.com

Link: <https://icpmnetwork.com/company/roster/companyRosterDetails.html?companyId=19113&companyRosterId=68>

Conference: Fall Conference

Start Date: November 10, 2020

Organizer: State Association of County Retirement Systems (SACRS)

End Date: November 13, 2020

Location: Indian Wells, California

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

The State Association of County Retirement Systems (SACRS) is an association of 20 California county retirement systems, enacted under the County Employees Retirement Law of 1937. Its semi-annual conferences provide relevant, actionable intelligence on fiduciary responsibility, investment management strategies and recent legislation impacting its member systems' pension programs. These conferences and other SACRS' events provide a platform for trustees, staff and our affiliate members to exchange ideas and best practices on pension administration.

See the website for more information about the conference.

Fees

Not yet available.
Last year's fees: \$120 - system
and other non-profit member
\$2,670 - non-member

Contact

Phone: 916-701-5158

Email

sacrs@sacrs.org

Link: <https://sacrs.org/Events/Fall-Conference>

Conference: Equity Research and Valuation

Start Date: November 12, 2020

Organizer: CFA Institute - Hosted with the CFA Society Boston

End Date: November 13, 2020

Location: New York, New York

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Investments

Attendance: Open To All

This conference aims to keep investment managers abreast of the latest advances and developments in equity research techniques, valuation, and portfolio management. Join world-class equity investors for insights into valuation to help you avoid the market's noise and stay focused on client objectives. Learn to avoid behavioral pitfalls in investing, and gain a better understanding of the differences between pricing assets and valuation.

See the website for more information about the conference.

Fees

Not yet available.

Contact

Phone: (434) 951-5499
Toll-free: 1 (800) 247-8132
Fax: (434) 951-5262

Email

ceprogram@cfaoinstitute.org

Link: <https://www.cfainstitute.org/en/events/conferences/equity-2020>

Course: Trustees Masters Program

Start Date: November 14, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: November 16, 2020

Location: Honolulu, Hawaii

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Open To All

This program is for advanced-level trustees. It is divided into two tiers:

- Tier One: Core Program
- Tier Two: Candidate Classes - Attend two specially designed courses held during the U.S. Annual Conference.

More information about the conference is not yet available. The 2019 topics included:

- Establishing Goals and Objectives
- Using Fund Professionals Wisely
- Attributes of a Good Trustee
- Measuring Investment Performance
- Case Studies
- Future Challenges

Tiers one and two are required for course completion and to receive your Trustees Masters program (TMP) pin.

Fees

\$2,070 - non-members
\$1,850 - members
\$300 discount for registration by
October 5, 2020

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/certificateprograms/tmp/Pages/trustees-masters-program-tmp-20d2.aspx>

Conference: Annual Employee Benefits Conference

Start Date: November 15, 2020

Organizer: International Foundation of Employee Benefit Plans (IFEBCP)

End Date: November 18, 2020

Location: Honolulu, Hawaii

**Alternative Date(s)
& Location(s)** N/A

Topic Area: General

Attendance: Members Only

This conference is the educational event to attend for most current information and perspectives from leading industry experts on all areas of employee benefits.

More information about the conference is not yet available. The 2019 topics included:

- The Professional Trustee Scope and Purpose
- Fiduciary Responsibilities in a Defined Contribution Plan
- Legal and Legislative Update for Health Plans
- Current Trends in Opioid Identification, Prevention, Intervention and Treatment
- A Case Study in PBM Selection and Contracting
- Innovations in Managing Pharmacy Costs
- Finding and Fighting Fraud and Abuse in Health Plans
- Medical Cannabis Lessons From Canada: Workplace Safety and Coverage Considerations
- Modern Asset Allocation (1.0 and 2.0)
- Investment Strategy Debates
- How Investment Managers Construct Portfolios
- Effective Communications Confronting Today's Headlines About Your Pension Plans

Fees

\$1,925
\$300 discount for registration by
October 5, 2020

Contact

Toll Free: (888) 334-3327

Email

edreg@ifebp.org

Link: <https://www.ifebp.org/education/usannual/Pages/annual-employee-benefits-conference-2001.aspx>

Course: Investment Strategies and Portfolio Management

Start Date: November 16, 2020

Organizer: The Wharton School, University of Pennsylvania

End Date: November 20, 2020

Location: Philadelphia, Pennsylvania

Alternative Date(s) & Location(s) June 1-5, 2020, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program provides a solid understanding of today's investment landscape and the tools and theories for developing and measuring the performance of portfolios. It provides actionable theories and practical tools for addressing asset allocation, risk management, performance measurement, and investment policies. It explores individual asset classes, including bonds, hedge funds, private equity, derivatives, real estate, and international markets to help participants better understand when to include these investments in their portfolios. Topics include:

- Modern Portfolio Theory
- Performance Measurement
- Evaluating Managers and Strategies
- Advanced Asset Allocation
- Investment Policy
- Outlook for the Economy and Navigating Its Risk

See the website for more information about the program.

Fees

\$11,280

Fee includes lodging and most meals.

Contact

Phone: 215.898.1776

Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <http://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/investment-strategies-and-portfolio-management>

Conference: Asset Allocation

Start Date: November 17, 2020

Organizer: Pensions & Investments

End Date: November 17, 2020

Location: Chicago, Illinois

Alternative Date(s) & Location(s) November 19, 2020, New York NY

Topic Area: Investments

Attendance: Open To All

In order to be more resilient to ever-changing financial climates characterized by consistently high volatility and risk premia, a successful asset allocation investing strategy must identify and evaluate priorities and effectively manage risk. Multi-asset strategies continue to play a part in overall strategy providing the potential for upside plus the protection against downside across a wide variety of market conditions. This conference will help navigate this challenging and turbulent landscape by examining the following:

- How to set your strategy in an unpredictable world
- Dynamic portfolio risk management
- Tactical rebalancing
- Diversification and asset allocation strategies
- Alternative risk premia solutions: beyond stocks and bonds
- Managing alpha vs managing beta

See the conference website for more information.

Fees

Not available.

Please contact the conference organizer.

Contact

Diane Pastore

Director of Conference

Programming

Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/asset-allocation/2020>

Conference: Asset Allocation

Organizer: Pensions & Investments

Location: New York, New York

Start Date: November 19, 2020

End Date: November 19, 2020

Alternative Date(s) & Location(s) November 17, 2020, Chicago IL

Topic Area: Investments

Attendance: Open To All

In order to be more resilient to ever-changing financial climates characterized by consistently high volatility and risk premia, a successful asset allocation investing strategy must identify and evaluate priorities and effectively manage risk. Multi-asset strategies continue to play a part in overall strategy providing the potential for upside plus the protection against downside across a wide variety of market conditions. This conference will help navigate this challenging and turbulent landscape by examining the following:

- How to set your strategy in an unpredictable world
- Dynamic portfolio risk management
- Tactical rebalancing
- Diversification and asset allocation strategies
- Alternative risk premia solutions: beyond stocks and bonds
- Managing alpha vs managing beta

See the conference website for more information.

Fees

Not available.
Please contact the conference organizer.

Contact

Diane Pastore
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Programming
Phone: (212) 210-0241

Email

dpastore@pionline.com

Link: <https://conferences.pionline.com/conference/asset-allocation/2020>

Course: Venture Capital

Organizer: The Wharton School, University of Pennsylvania

Location: San Francisco, California

Start Date: December 06, 2020

End Date: December 10, 2020

Alternative Date(s) & Location(s) Apr. 27 - May 1, 2020, Philadelphia PA

Topic Area: Investments

Attendance: Open To All

This program will discuss how VC funds are organized, how investments are selected, and how due diligence is conducted. It will examine case studies that detail a transaction from beginning to end. Participants will see how a deal is structured, learn more about the differing incentives of a VC fund and entrepreneurs, and gain a deeper understanding of venture investing. Session topics may include:

- Limited Partner/General Partner Negotiation and Contracting
- The VC Business Model: Sourcing, Screening, and Selection
- Venture Capital Valuation Method
- Term Sheets: The Venture Capitalist's and Entrepreneur's perspectives
- Deal Sourcing
- Managing Innovative Processes
- Later-Round Financing
- Preferred Stock Valuation
- Exit Strategies

See the website for more information about the program.

Fees

\$11,350
Fees include meals but not accommodations.

Contact

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Toll-free: 1.800.255.3932

Email

execed@wharton.upenn.edu

Link: <https://executiveeducation.wharton.upenn.edu/for-individuals/all-programs/venture-capital>

Conference: Legislative Conference

Start Date: January 24, 2021

Organizer: National Conference on Public Employee Retirement Systems

End Date: January 26, 2021

Location: Washington, District of Columbia

**Alternative Date(s)
& Location(s)** N/A

Topic Area: Pension Plan Policy

Attendance: Members Only

This is a conference for public fund trustees and plan administrators, highlighting the issues on Capitol Hill and in federal regulatory agencies that affect pension funds today. Past conferences have brought senior administration officials, Members of Congress and Washington insiders to help educate fund members on the critical issues affecting public pensions and equip them with the tools needed to deal with these issues effectively and meet-face-to-face with their elected leaders on the Hill.

See the website for more information about the conference.

Fees

Not yet available.
Previous year's fees: \$615

Contact

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Link: <http://www.ncpers.org/legislative>

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